

## REQUEST FOR PROPOSAL

**Original Date Issued:** July 9, 2018

**Deadline for Questions:** July 16, 2018

**Closing Date:** July 24, 2018

**Anticipated Award Date:** August 14, 2018

**Reference:** ICMA Washington, DC

**Subject: Request for Proposal No. Professional Services to Support and Administer the ICMA Coaching Program**

The International City/County Management Association (ICMA) seeks proposals from eligible Respondents for professional services for ICMA in Washington, D.C. ICMA anticipates awarding one (1) single award a result of this solicitation. ICMA reserves the right to award more or fewer awards than anticipated above.

Technical questions concerning this solicitation should be directed to the ICMA Director of Career Services and Next Generation Initiative at [careers@icma.org](mailto:careers@icma.org). All contractual questions relating to this solicitation must be submitted to Representative, Grants and Contracts Administration at [workwithus@icma.org](mailto:workwithus@icma.org).

All communications must include the solicitation title, **Professional Services to Support and Administer the ICMA Coaching Program** in the subject line.

No communication intended to influence this procurement is permitted except by contacting the designated contacts above. Contacting anyone other than the designated contacts (either directly by the Respondent or indirectly through a lobbyist or other person acting on the respondent's behalf) in an attempt to influence this procurement: (1) may result in a Respondent being deemed a non-responsive Respondent, and (2) may result in the Respondent not being awarded a contract.

This solicitation in no way obligates ICMA to award a contract nor does it commit ICMA to pay any cost incurred in the preparation and submission of a proposal.

ICMA bears no responsibility for data errors resulting from transmission or conversion processes.

ICMA appreciates your responsiveness and look forward to a mutually beneficial business relationship.

Sincerely,

## **Professional Services to Support and Administer the ICMA Coaching Program**

### **PURPOSE**

ICMA seeks a qualified service provider to support and administer the ICMA Coaching Program content in coordination with designated ICMA staff.

### **ABOUT ICMA**

ICMA advances professional local government worldwide. Our mission is to advance professional local government through leadership, management, innovation, and ethics. ICMA provides member support, data and information, peer and results-oriented technical assistance, and training and professional development to more than 11,000 ICMA members, city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect millions of individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

ICMA is a 501(c)(3) nonprofit organization founded in 1914 that offers a wide range of services to its members and the local government community. The organization is an internationally recognized publisher of information resources ranging from textbooks and survey data to topical newsletters and e-publications. ICMA provides technical assistance to local governments in developing and decentralizing countries, helping them to develop professional practices and ethical, transparent governments. The organization performs a wide range of mission-driven grant and contract-funded work both in the U.S. and internationally, which is supported by federal government agencies, foundations, and corporations.

For more information regarding ICMA's programs and services, please go to [www.icma.org](http://www.icma.org).

ICMA's Dun and Bradstreet number is 072631831

### **SCOPE OF WORK**

See Attachment A for the full scope of work.

### **BACKGROUND**

The ICMA Coaching Program attracts talent to local government and ICMA membership and promotes professional development. The Coaching Program provides a comprehensive set of learning and career development opportunities that share leading practices, encourage professional growth, and stimulate cultures of talent development among ICMA members and non-members, their local government organizations, ICMA State Association and Outreach Partners.

The Coaching Program focuses on the development needs of two groups:

- New local government executives or persons applying to become local government executives to enhance their prospects for success through targeted support at their critical initial stages of leadership responsibility.

- Up-and-coming local government management talent to outline career pathways and opportunities, provide guidance and support on ways to prepare for advancement, and enrich the network of relationships and resources to enjoy rewarding careers.

Through a volunteer network of experienced local government executives and senior assistants serving as coaches, the Program aims to:

- Support the professional and personal development of new and aspiring local government leaders.
- Encourage an ethos of mentoring and coaching at all levels in the local government management profession.
- Provide opportunities for successful local government managers to share their expertise in ways that are effective, efficient, and personally rewarding.
- Provide connections, resources, and support to help build equity and inclusiveness in the profession.

**I. DELIVERABLES**

1. Development of Coaching Program Learning Experiences Including at Least Six (6) Original Coaching Webinars plus working with staff to produce/re-use content for additional Podcasts, Videos, or Live Engagements, with performance analysis, speaker follow-up, and customer support.
2. Relationship Management with Coaching State and Outreach Partners
3. Develop and revise materials for [icma.org/coaching](http://icma.org/coaching)
4. Develop and Facilitate Coaching Program Specific Sessions for ICMA
5. Develop Strategy and Engagement with ICMA State Associations and Other Coaching Partners
6. Continuous Innovation and Improvement

All materials will be branded with ICMA Coaching Program approved designs and ICMA will retain copyright to coaching materials.

**SUBMISSION REQUIREMENTS**

Section 1: Company profile:	<p>Please limit to no more than two pages. CV's or resumes will not count toward the page limit.</p> <ol style="list-style-type: none"> <li>1. Provide a description of your business</li> <li>2. Provide the year established in the current business for the services requested in this request for proposal.</li> <li>3. CV's or resumes of key personnel- in a leading paragraph, please indicate how much time each person(s) will devote to this contract and what other projects this person (s) undertake at the same time.</li> </ol>
Section 2: References:	<p>A description of the types and sizes of client organizations served, as well as a sample client list indicating the type of services rendered. Respondents should provide references as follows:</p>

	<ol style="list-style-type: none"> <li>4. At least three (3) examples of relevant work;</li> <li>5. The contact information should include the contact name, phone number, e-mail address, and website address. References will be contacted as part of the evaluation process.</li> </ol>
Section 3. Approach:	<ol style="list-style-type: none"> <li>1. Describe understanding and experience in engaging the local government practitioner audience</li> <li>2. Describe your ability to organize and present learning experiences through various media platforms</li> <li>3. Explain your coaching expertise and connections to additional resources to support the the ICMA Coaching Program</li> </ol>
Section 4. Pricing:	<p>ICMA will consider a proposal that is either a transaction level, fixed-fee, level of effort rate subject to a maximum not to exceed fee or other arrangement fair and favorable to ICMA.</p> <p>If proposing a transaction fee arrangement, provide your proposed transaction fee for each of the transaction types anticipated under this scope of work.</p> <p>For other than transaction fee arrangement, please describe your pricing method and why this would be advantageous to ICMA.</p> <p>Please be advised that ICMA is cost-conscious about procuring outside services.</p>

**TYPE OF CONTRACT TO BE AWARDED**

TBD

**CONTRACT TERM AND DELIVERY DATES**

ICMA expects this scope of work to be completed in 1 year. Final delivery dates will be negotiated upon award.

**EVALUATION AND AWARD PROCESS**

Offers will be evaluated based upon:

1. ability to match the qualifications set forth in this solicitation
  - a. section 1 (20%)
  - b. section 2 (20%)
  - c. section 3 (35%)
2. price (25%)

ICMA reserves the right to award under this solicitation without further negotiations. The respondents are encouraged to offer their best terms and prices with the original submission.

**INSTRUCTIONS TO THE RESPONDENTS**

Respondents interested in providing the services described above should submit a proposal following the prescribed format in the Submission Requirements section of this RFP.

Adherence to the proposal format by all respondents will ensure a fair evaluation with regard to the needs of ICMA. Respondents who do not follow the prescribed format may be deemed non-responsive. A letter transmitting the proposal must be signed by an officer of the firm authorized to bind the respondent as required by this solicitation.

1. Transmission letter
2. Package no more than 20 pages excluding CV's or resumes and required forms
3. Completed and signed required forms

Packages must be submitted electronically to Representative, Grants and Contracts Administration at [workwithus@icma.org](mailto:workwithus@icma.org) with a subject line noting the RFP title and number found on page one of this solicitation. No phone calls please.

Applications received after the closing date stated on the top of page 1 will be rejected.

#### **APPENDICES (REQUIRED FORMS)**

W-9

New Vendor Form

#### **GENERAL CONDITIONS**

Proposal Submission - Late proposals and proposals lacking the appropriate completed forms will be returned. Faxed proposals will not be accepted. Proposals will not be accepted at any other ICMA location other than the email address above. If changes are made to this solicitation, notifications will be sent to the primary contact provided to ICMA from each Respondent. ICMA takes no responsibility for effective delivery of the electronic document. The vendor offer will be rejected, if the vendor modifies or alters the electronic solicitation documents.

Contract Award - ICMA anticipates making one award under this solicitation. It may award a contract based on initial applications without discussion, or following limited discussion or negotiations. Each offer should be submitted using the most favorable cost and technical terms. ICMA may request additional data or material to support applications. ICMA expects to notify Respondents in approximately one month from the proposal due date whether your proposal has been selected to receive an award.

Limitation - This solicitation does not commit ICMA to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. ICMA reserves the right to accept or reject any or all proposals received, to negotiate with all qualified sources, or to cancel in part or in its entirety the solicitation when it is in ICMA's best interest.

Disclosure Requirement - The Respondent shall disclose any indictment for any alleged felony, or any conviction for a felony within the past five years, under the laws of the United States or any state or territory of the United States, and shall describe circumstances for each.

When a Respondent is an association, partnership, corporation, or other organization, this disclosure requirement includes the organization and its officers, partners, and directors or members of any similarly governing body. If an indictment or conviction should come to the attention of ICMA after the award of a contract, ICMA may exercise its stop-work right pending further investigation, or terminate the agreement.

No Gifts - It is ICMA's Policy that no gifts of any kind and of any value be exchanged between respondents and ICMA personnel. Discovery of the same will be grounds for disqualification of the Respondent from participation in any ICMA's procurements and may result in disciplinary actions against ICMA personnel involved in such discovered transactions.

Equal Opportunity - In connection with the procurement of the specified services, the firm warrants that it shall not discriminate because of race, color, religion, sex, national origin, political affiliation, non-disabling physical and mental disability, political status, matriculation, sexual orientation, gender identity or expression, genetic information, status as a veteran, physical handicap, age, marital status or any other characteristic protected by law.

Small and Disadvantaged Businesses - ICMA shall use good faith efforts to provide contracting and procurement opportunities for SBD's. SDB categories include minority business enterprises (MBE), woman-owned business enterprises (WBE), small veteran and disabled veteran owned businesses, Historically Black Colleges and Universities (HBCUs), predominantly Hispanic Universities (HACUs), small businesses in Historically Under-utilized Zones (HUBZones) and private voluntary organizations (PVOs) principally operated and managed by economically disadvantaged individuals.

## **Attachment A – Scope of Work The ICMA Coaching Program**

Deliverables:

**1) Develop ICMA Coaching Program Learning Experiences to be Delivered Through a Variety of Media Platforms. Minimally Six (6) Original Coaching Webinars; one annual conference session, and facilitation of Speed Coaching session at the ICMA annual conference.**

**a) Topic Identification, learning experience scheduling, and acquiring registrations**

- i) Identify desired topics and formats through state-partner crowdsourcing and develop a cohesive coaching program providing support to established managers and emerging leaders, and for building equity and inclusiveness in the profession.
- ii) Develop program and delivery schedule to optimize participation opportunities across state Coaching Partners, minimize conflicts with existing ICMA and state partner conferences and webinars, navigate multiple objectives and scheduling requests. ICMA will have final approval of topics and scheduling.
- iii) Prepare schedule and registration opportunities for all webinars for posting by ICMA Staff to the ICMA website ([icma.org/coaching](http://icma.org/coaching)) and via electronic mail by ICMA Staff to Coaching Partners and other subscribers on the Program email distribution mailing list; coordinate with ICMA to select a recurring time/day for Coaching Program webinars that does not conflict with scheduled paid webinar content.
- iv) Prepare, in coordination with ICMA, information notices per webinar to Coaching Partners and subscribers; ICMA will approve and send all bulk correspondence regarding the Coaching Program. Contractor will maintain direct individual communication with partners, speakers, and the ICMA coaching team.
- v) Solicit three volunteer presenters for each webinar endeavoring for a good mix of perspectives, and diversity (geographical, stage in career, gender, organizational experience, state partner representation, etc.). ICMA will review presenter list in advance of finalizing the calendar and reject any presenter not in good standing with the organization, deemed not to be a subject matter expert, or having presented at a Coaching Webinar during the past two years.

**b) Prepare Coaching Program Learning Experiences**

- i) Schedule a minimum of one coordination call with presenters prior to webinar, to include presentation topics, coverage, use of technology, and other needs the manager sees fit; to ensure speakers know the technology and the presentations are not redundant.
- ii) Review and provide feedback on draft presentation materials submitted by presenters; webinar content will be original to the presenter(s) and not put ICMA or the Coaching Program at risk of copyright infringement.
- iii) Prepare presenters' bios, photos, background articles, handouts, etc. for digital handouts (that enable participants to explore topics more deeply) for each webinar; to be sent to ICMA to post on the ICMA website ([icma.org/coaching](http://icma.org/coaching)) in time for registrants to access the materials the day of the presentation. The final collection of webinar material should be presented as a

“training in a box” for use after the session, or by interested parties using the materials in concert with the recording(s).

- iv) Prepare presenters for webinars with advance practice sessions to train presenters in critical components for successful webinar presentations, review and develop presentation materials, and revise and enhance substance and presentational components.
- v) Manage technology assets to provide signups and easy-to-access materials to subscribers on the Program email distribution mailing list. Any third-party providers used in delivery of Coaching Program content or services will be in good standing with ICMA and not conflict with ICMA goals, mission, or code of ethics.
- vi) Prepare polling questions and post webinar surveys to reinforce key points and enhance learning experience for subscribers on the Program email distribution mailing list.
- vii) Develop marketing notices to be sent by ICMA directly to the Program email distribution mailing list; ICMA to have final approval on the form of all email and other marketing materials and their scheduling.

**c) Deliver Webinars at the Scheduled Times**

- i) Moderate webinars to guide sessions, present polls, address questions from audiences, and boost value for audiences will be done in a professional manner and reflect positively on the Coaching Program and the ICMA brand.
- ii) Record webinars/learning experiences and deliver in web-ready formats to the archive site.
- iii) Develop and be prepared to execute a backup plan should the information technology fail at any point during the process. Any backup systems are the responsibility of the provider unless agreed upon with ICMA at contract execution. ICMA will provide the platform to host the webinars, but the provider will be responsible for assisting in the development and execution of the backup plan and knowing/managing the primary platform.

**d) Follow-Up Activities**

- i) Summarize polling results to share learning among Coaching Partners and other subscribers on the Program email distribution mailing list.
- ii) Convert recordings to web-ready formats.
- iii) Post video recordings and electronic handouts in Archives for active use.
- iv) Analyze feedback from attendees and summarize responses for ICMA after each webinar or upon request.
- v) Actively using response analysis to adjustment and improve content and delivery of learning experiences.
- vi) Notify presenters, Coaching Partners, and others on results of webinars including a summarization of highlights from the webinars and encouragement to help non-attendees gain value from the archives.

**2) Relationship Management with Coaching State and Outreach Partners**

- a) Develop periodic reports summarizing program results, feedback, and ratings to ICMA, State, and Outreach Partners (quarterly, unless otherwise requested by ICMA).
- b) Respond to coaching program queries from partner organizations, volunteer coaches, and individuals.



- c) Recommend to Coaching Partners leading practices for optimizing value from the program for their members.

**3) Develop and revise materials for icma.org/coaching**

- a) Provide updated content to ICMA for preapproval materials that enhance the coaching experience for 1:1 coaching, webinar participation, and the benefits of mentoring/coaching for coaches and players.
- b) Coordinate with ICMA for appropriate posting and updates.
- c) Develop ICMA Coaching Program YouTube channel to provide dynamic content via brief video clips of ICMA senior and emerging leaders.

**4) Develop and Facilitate Coaching Program Specific Sessions for ICMA**

- a) Deliver a successful "Speed Coaching" experience at the ICMA Annual Conference.
- b) Assist state and outreach partners with digital materials and telephone support to develop and execute Speed Coaching events at state meetings.
- c) Support the program with new service ideas to enhance Program value.
- d) Leadership and facilitation of select sessions at ICMA Annual conference, at a minimum to include the annual state partners meeting, and as needed one additional special session promoting the value of mentoring and directed talent development.

**5) Develop Strategy and Engagement with ICMA State Associations and Other Coaching Partners**

- a) Collaboration with ICMA staff and current ICMA State Association and Outreach Coaching Partners to define roles and opportunities within the ICMA Coaching Program.
- b) Prepare program outreach and marketing materials for use with each annual program launch, to include annual webinars schedule, one-to-one coaching benefits and how to access, annual conference session description(s), and a roster of other available coaching resources. ICMA to provide design, layout, duplication, publication, etc.

**6) Continuous Innovation and Improvement**

- a) Develop iterative or new services to respond to changing needs (e.g. Virtual Speed Coaching to reach unserved audiences)
- b) Explore, develop, and implement new technological solutions (e.g. future upgrades to integrated audio and video recordings, as needed, etc.) as needed, in conjunction with ICMA.
- c) Work with ICMA on the best method of product service delivery to maximize efficiencies for ICMA databases and smoothest user experience.
- d) Facilitate quarterly conference calls with Coaching Program team to discuss program success, improvements, metrics, and webinar/event planning.